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MONTANA STATE LIBRARY



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INFORMATION PROCESSING OPERATIONS OF THE

MONTANA UNIVERSITY SYSTEM AND COMMUNITY COLLEGES

A REPORT TO THE BOARD OF REGENTS BY THE

COMMISSIONER OF HIGHER EDUCATION

STATE DOCUMENTS COLLECTION

JUN 20 2003

October 1986

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The Board of Regents has placed computing policy under the aegis of its By-laws and Policy Committee.⁶ While there is no formal assignment of library policy to any board committee, it would presumably fall to the Curriculum Committee if there were matters for consideration.

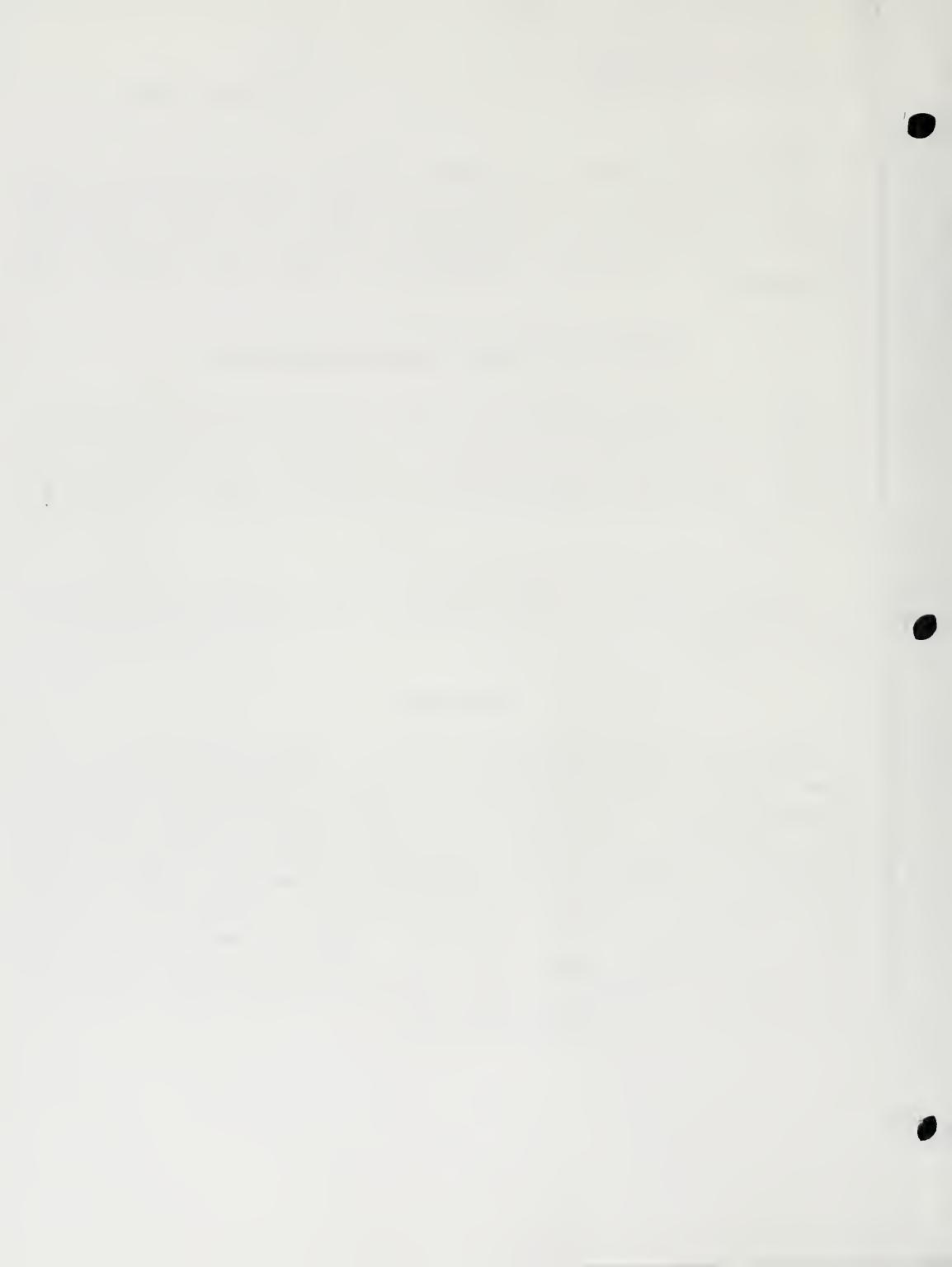
Study of Library and Computing Operations

At its meeting in Lewistown on April 17 & 18, 1986, the Board of Regents requested several staff studies to assist in its consideration of future organization and operation of public higher education in Montana. Two specific requests were to review library and computing operations.

There has been no system review of either libraries or computing in the last ten years. It has not been ascertained if there were any earlier studies.

Libraries

The libraries of the Montana University System and community colleges are comprised of nine general purpose educational libraries⁷, a specialized law library and several other special-purpose libraries such as the Bureau of Business and Economic Research at the University of Montana. In addition, a few departments may maintain small departmental collections. With the exception of the law library at the University of Montana and the Creative Arts Library at Montana State University, the special-purpose libraries and departmental libraries are not included in university system holdings and are excluded from consideration here due to time constraints.



Holdings

The university system libraries consist of 1,560,000 volumes, 11,775 serial subscriptions, 2,823,000 microforms, and 1,297,000 government documents as well as other types of materials such as maps, music, etc. The community colleges collections are comprised of 43,000 volumes, 577 serial subscriptions and 52,800 microforms. Table 1 portrays these collections by institution.

Table 1. Library Collections, by campus,
as of June 30, 1986

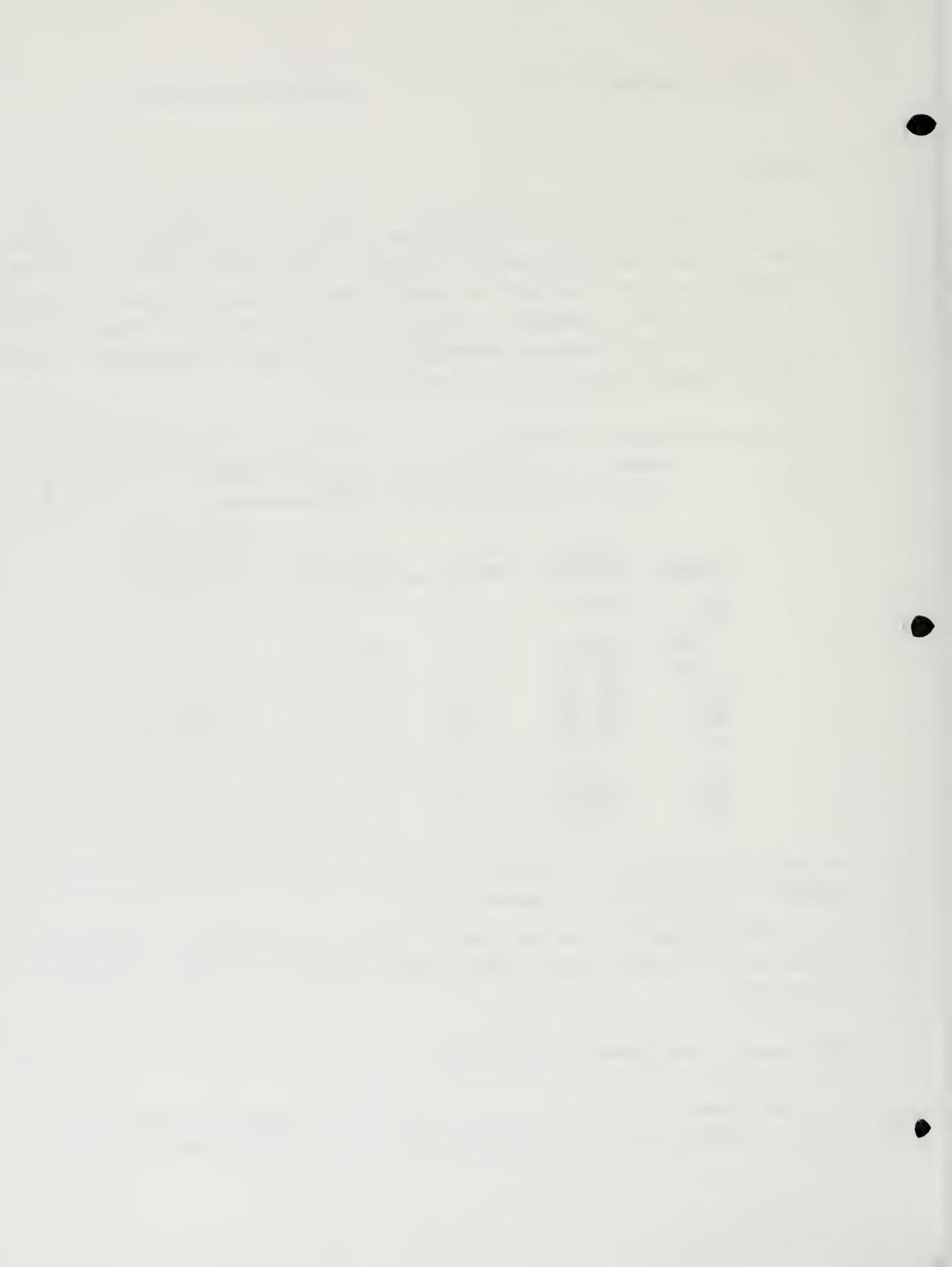
<u>Campus</u>	<u>Number of Volumes</u>	<u>Number of Serials</u>	<u>Number of Microforms</u>	<u>Number of Government Documents</u>
MSU	480,096	4,337	774,923	66,549
UM				
Main	576,845	4,792	991,212	806,324
Law	106,386	786	22,694	
EMC	145,631		486,546	223,047
TECH	86,412	710	170,427	123,002
NMC	100,000	650	352,500	73,678
WMC	65,100	500	25,000	3,900
FVCC	11,403	95	0	0
DCC	16,748	237	N/A	N/A
MCC	15,342	245	52,800	0

SOURCE: Library Survey, Summer 1986

These collections summarized in Table 1 represent a substantial investment and have been a major contribution to resource sharing in the state.

Departmental and Special Collections

Departmental libraries are discouraged in some instances and allowed in some, particularly when there are perceived special needs or



space problems. In most circumstances, however, the departmental and special libraries are not controlled by the university librarian nor included in its holdings inventories.

Changes in Holdings

During any given year the collection changes because of a number of factors, expanding when new additions are made and contracting when items are removed. Table 2 portrays these changes in holdings during FY 1986.

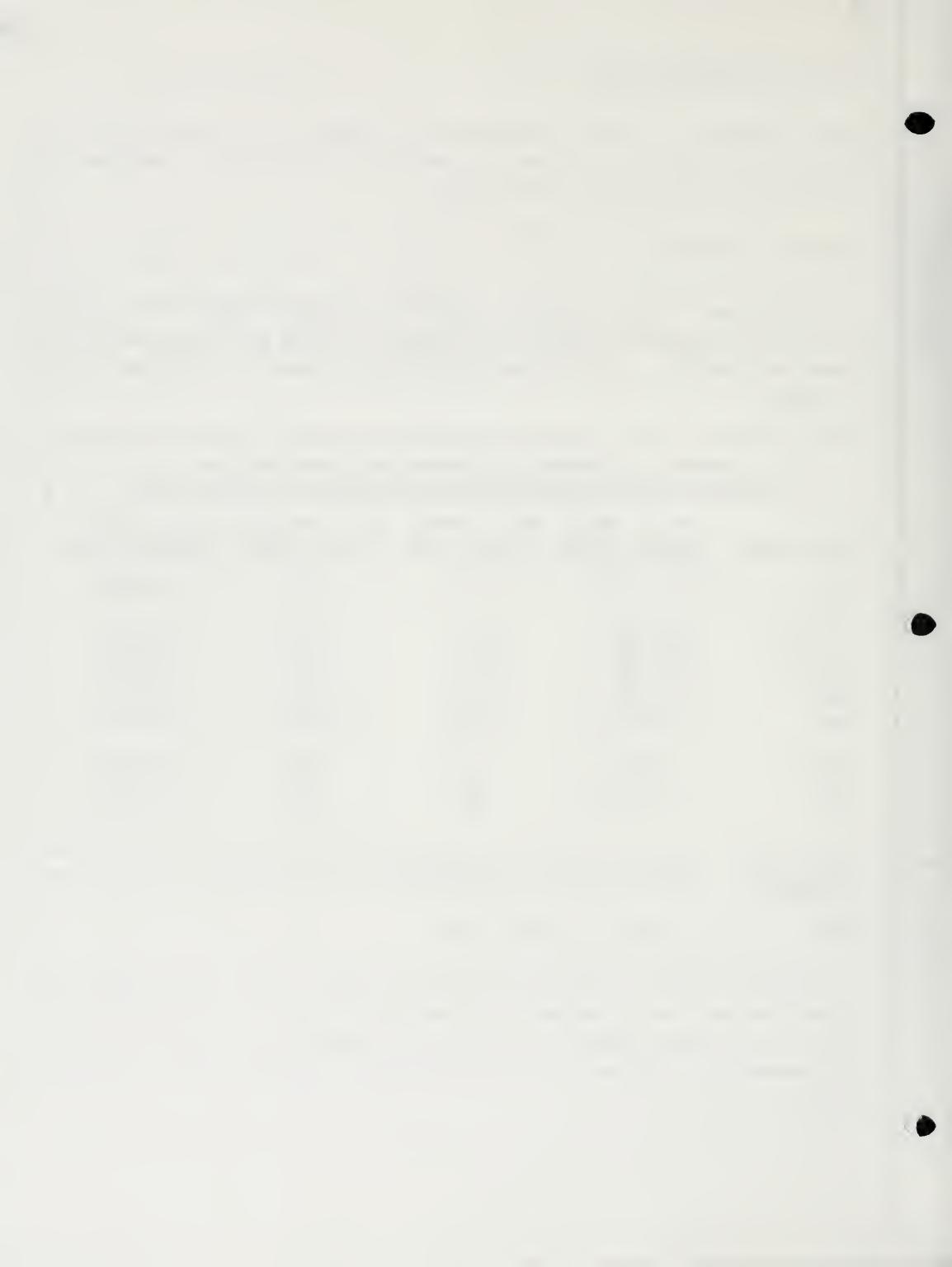
Table 2. Changes in Library Holdings, Montana University System and Community Colleges, FY 1985-FY 1986

Institution	Vols. Held June 30, 1985	Vols. Added during 1986	Vols. Removed during 1986	Vols. Held June 30, 1986
MSU	472,383	16,850	9,137	480,096
UM				
Main	564,044	14,704	1,903	576,845
Law	104,668	1,928	210	106,386
EMC	142,389	4,104	862	145,631
TECH	83,831	2,734	203	86,412
NMC	100,000	2,600	2,600	100,000
WMC	65,100	1,200*	1,000*	65,300
FVCC	11,296	313	107	11,403
DCC	16,517	419	188	16,748
MCC	15,733	344	735	15,342

*Estimated. Materials were purchased during the year but not accessioned.

SOURCE: Library Survey, Summer 1986

45,196 volumes were added during the most recent fiscal year and 16,945 volumes were removed from the collections. In 1975 the University of Montana added 31,764 volumes compared with 14,704 in 1986. The comparable figures for Montana State University were 29,035 and 16,850.



Cost of monographs

The books and periodicals component of the Higher Education Price Index shows that from 1976 to 1986, the prices of books and periodicals has increased 272%.⁸

The price of books varies by disciplines. In FY 1985 the average price for college and university book acquisitions was \$29.96.⁹ From FY 1975 to FY 1985 this figure has increased by 129%.¹⁰

Journals

Journals are a major source of the latest research findings in every discipline. Of even greater concern than the diminution of book or monograph additions, is the numbers of periodicals libraries are unable to continue because of decreased funding and increased costs. Table 3 portrays serials holdings and changes for the two years.



Table 3. Changes in Serials Holdings, Montana
University System and Community Colleges, FY 1985-FY 1986

<u>Institution</u>	<u>Serials Holdings</u>		
	<u>June 30, 1985</u>	<u>June 30, 1986</u>	<u>Change</u>
MSU	4,391	4,337	-54
UM			
Main	4,602	4,277*	-325
Law	779	786	+ 7
EMC	1,000	1,000	0
TECH	760	710	-50
NMC	670	650	-20
WMC	490	500	+10
FVCC	95	95	0
DCC	243	237	-6
MCC	245	245	0

*Excludes 515 government documents classified as serials in 1986 but not previously counted as serials.

SOURCE: Library Survey, Summer, 1986

In this single year, the number of serials holdings declined nearly 450. Over the last several years serials holdings have changed alarmingly at several of the libraries. Table 4 shows this change.

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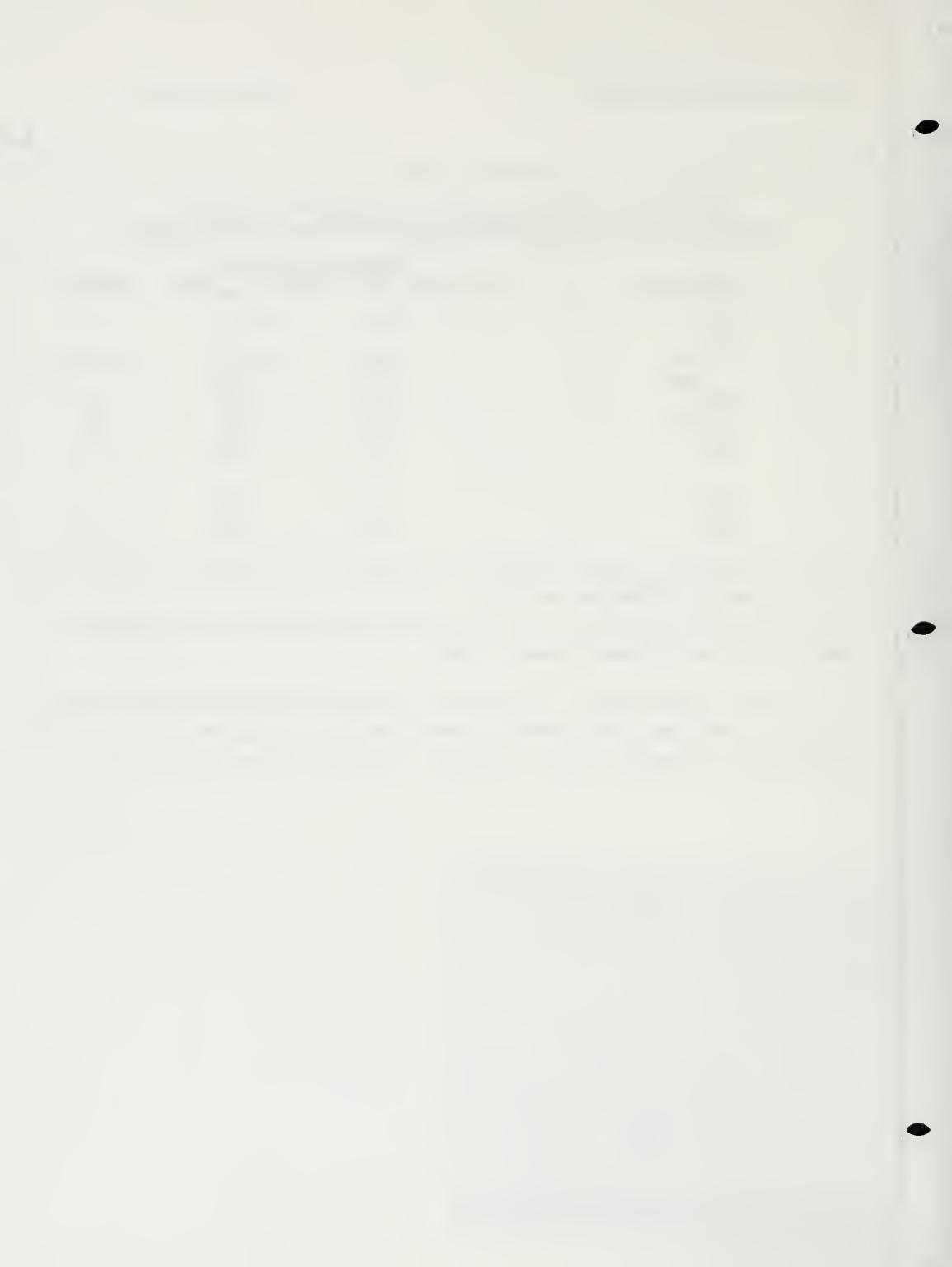


Table 4. Change in Serials Holdings, High to 1986
Selected Libraries, Montana University System

Institution	<u>Serials Holdings</u>	<u>Numerical Change</u>	<u>Percent Change</u>
	<u>High*</u>	<u>1986</u>	
UM	7,241	4,277	-40.93
MSU	5,160	4,337	-15.95
EMC	1,250	1,000	-20.00
WMC	400	500	+25.00
TECH	688	710	+ 3.19
NMC	607	650	+ 7.08
Total	15,346	12,124	-21.00

*The high figure was obtained from any of the years 1975, 1979, 1985 or 1986.

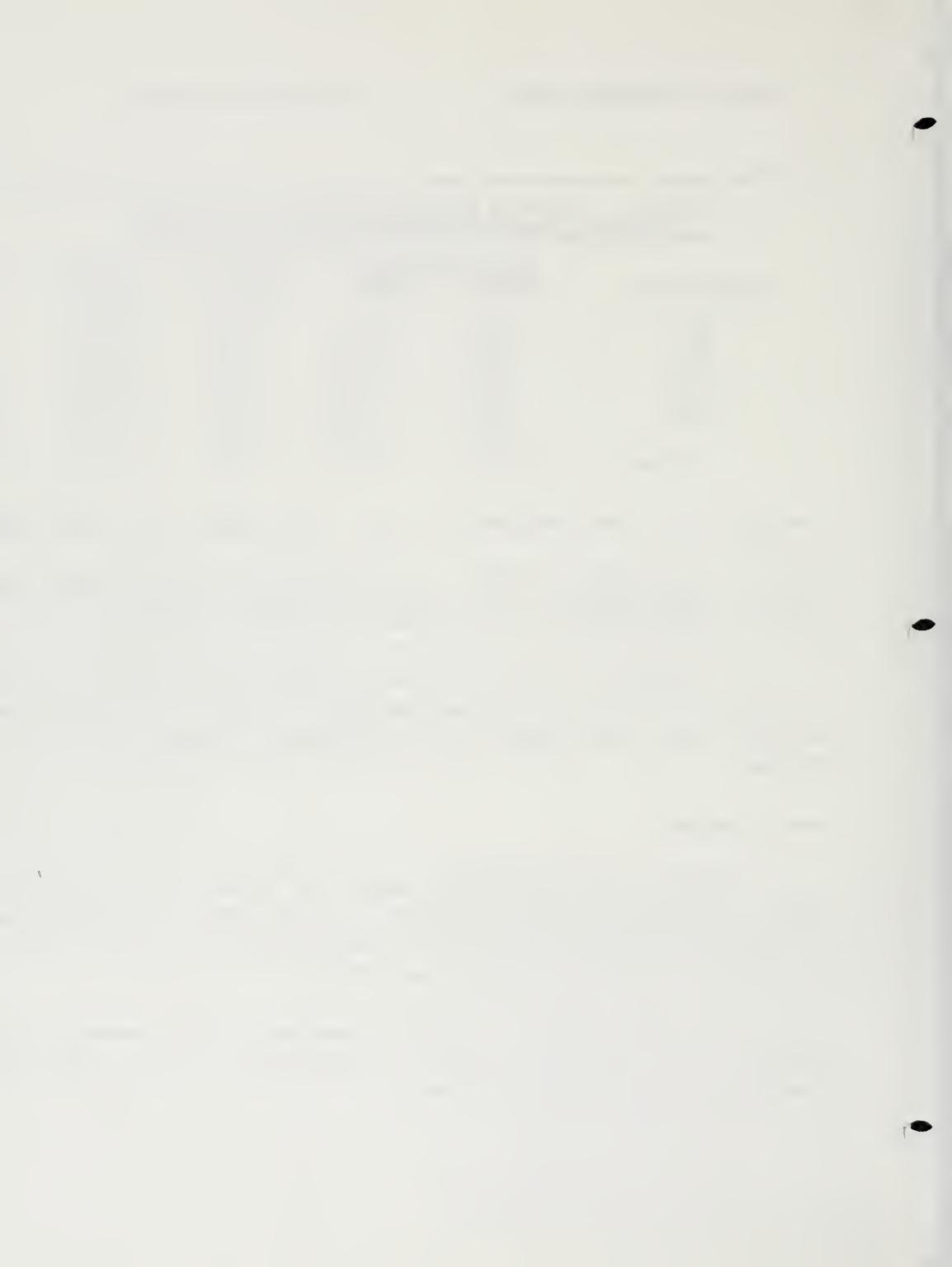
SOURCE: Montana State Library, "A Comparison of Volumes Added and Periodical Subscriptions at Four Montana University System Libraries," August 13, 1986; Library Survey, Summer, 1986; HEGIS Reports..

It is evident that there has been a substantial change in serials holdings in the university system and there is reason to suspect that the magnitude of the change must be affecting the quality of the libraries.

Cost of serials

In addition to the declining numbers of serials, the increasing costs of serials is a serious problem. In FY 1985 the average price of US periodicals was \$87.93. In the period from FY 1975 to FY 1985, the average cost of periodicals rose 154%.¹¹

Of the total numbers of serials acquired by the academic libraries, 30 to 50% are estimated to exceed \$100 in cost, even when discounts are taken into consideration.



Standards for collection adequacy

There are several sets of standards for college libraries. Professional library associations as well as accreditation associations maintain standards for measurement of library resources.

The most recent standards for college libraries supporting bachelors and masters level programs were prepared by the College Library Standards Committee and revised in 1986. They are not intended to apply to two-year institutions or doctoral research institutions. Institutions granting less than 10 doctoral degrees per year could use them, however.¹²

There are two documents relating to standards for community college libraries.

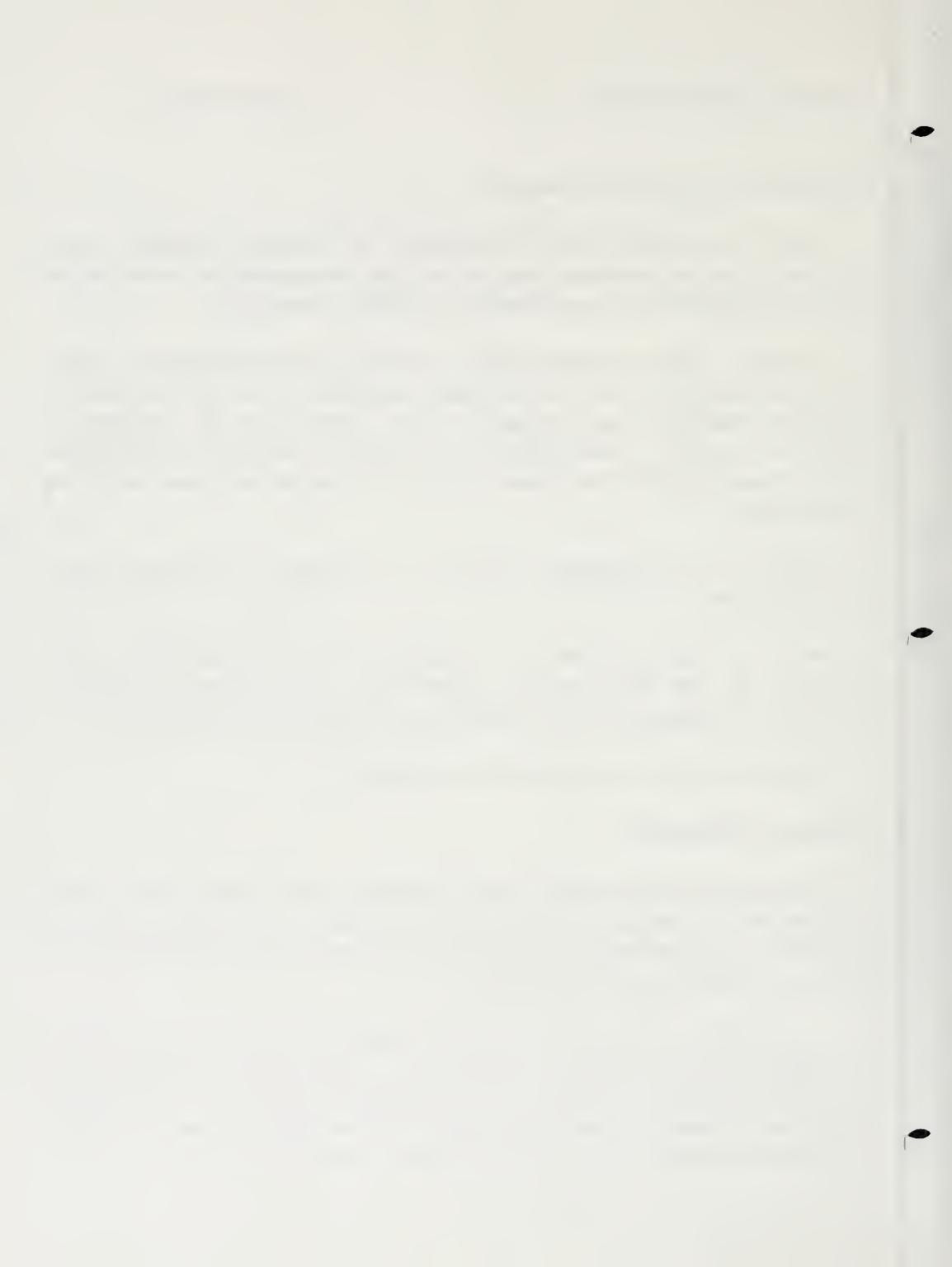
There are also two sets of standards for law libraries. One, presented by the American Bar Association, was revised in 1986.¹³ The other is prepared by the Association of American Law Schools.¹⁴

These standards are presented in Appendix 2.

Collection evaluation

Library collections need to be evaluated from time to time to determine how the collection relates to college or university programs and needs. Accreditation visitations are one way to accomplish this goal as is institutional evaluation.

In addition, libraries, through a cooperative effort with faculty and administration, need to delineate a collection development policy. The policy, in addition to reflecting individual institutional objectives, needs to be coordinated with other libraries to reduce duplications which could be served through resource sharing.



The University of Montana Library has a collection development policy. Montana State University's policy is currently being written. Eastern Montana College has a policy in place, although some details are incomplete. The policy statement at Montana Tech is insufficient. Northern Montana College and Western Montana College are initiating such policies. The community colleges do not have policy statements.

A collection assessment is generally considered a necessary evaluative activity in a well-managed library in order to contend realistically with the large volumes of materials being published and the increasing costs, both of which inhibit libraries from being able to collect all the materials available. In addition, resource sharing activities require good collection assessments.

Units of the Montana University System have collection assessments in process, particularly in conjunction with the Fred Meyer Trust co-ordinated collection development granting projects. The community colleges, with the exception of Flathead Valley Community College, have not undertaken collection analyses at this time.

Staffing

These collections are managed by 51 professional librarians, 96 non-professional staff and a number of student assistants. Table 5 portrays staffing numbers in June 1986 for each library.

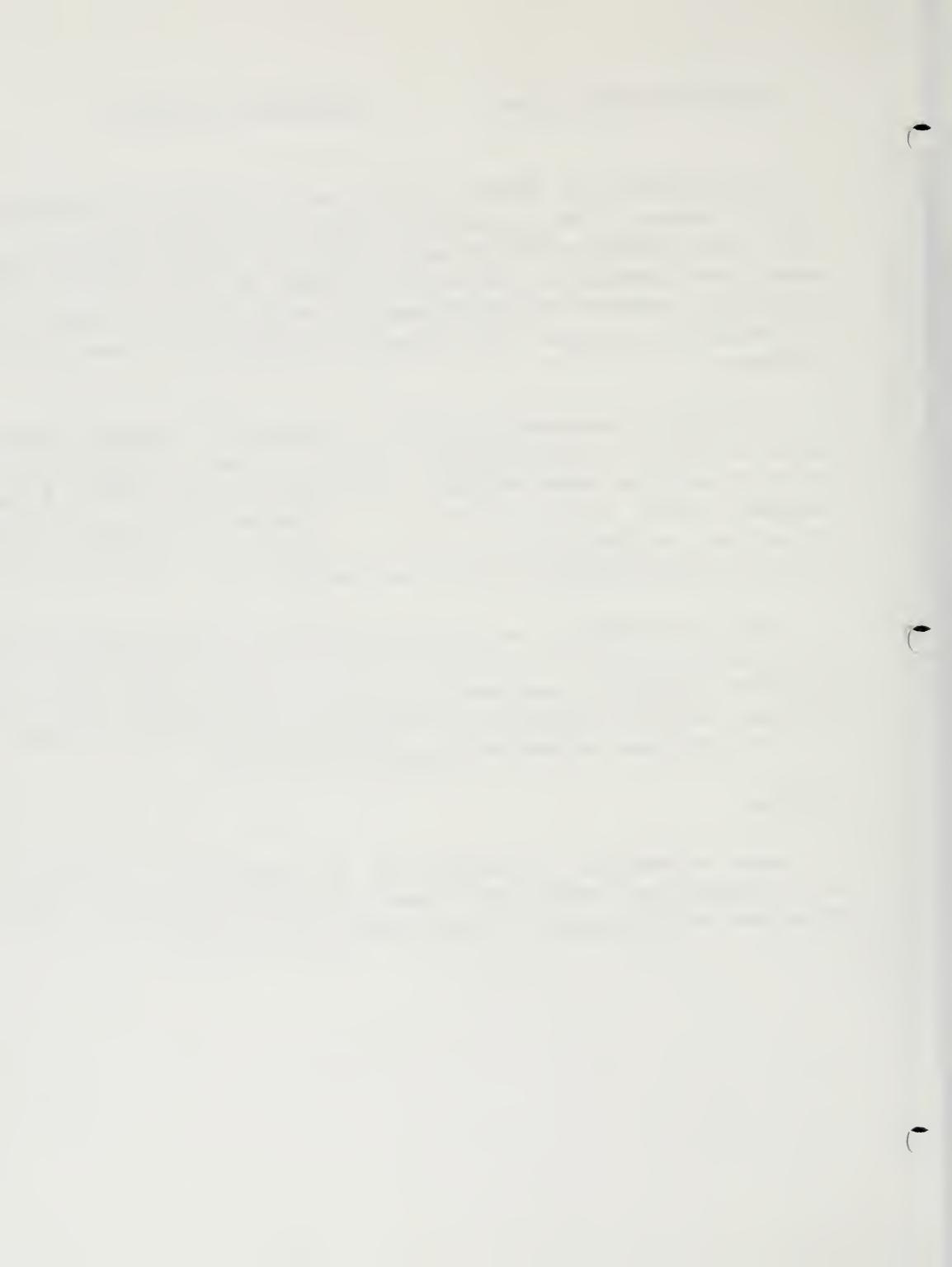


Table 5. FTE Library Staffing, June 1986

Institution	Professional Staff	Non-professional Staff	Student Staff*	Total Staff
MSU	20.0	39.0	16.0	75.0
UM				
Main	13.8	31.6	18.3	63.7
Law	2.0	2.5	.7	5.2
EMC	5.9	10.0	15.0	30.9
TECH	2	4.8	8.5	15.3
NMC	3	3	6	12
WMC	1	1	5	7
FVCC	1	1	3	5
DCC	1	1	1	3
MCC	1	2	.9	3.9

* 1,880 hours - 1 Student FTE

Approximately 220 full-time equivalent personnel are utilized to operate higher educational libraries.

Distribution of staff effort

University and community college librarians were asked to review the distribution of staff effort among major library functions. These functions were identified as general administration, documents, reserve operations, acquisitions, cataloging, interlibrary loan, special collections, data base maintenance, audio-visual activities, public service, library automation, planning and evaluation, teaching, and all other.

Table 6 provides a summary of the responses.

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Table 6. Distribution of FTE Effort by Library Functions,
Montana University System and Community Colleges, FY 1986

<u>Function</u>	<u>MSU</u>	<u>UM</u>	<u>EMC</u>	<u>TECH</u>	<u>WMC</u>	<u>NMC</u>	<u>FVCC</u>	<u>MCC</u>	<u>DCC</u>
General									
Admin.	8.63	7.65	1.73	0.45	0.35	0.1	.50		
Documents	2.88	0.55	0.98	0.62	0.1	0.3			
Reserve	2.49	0.55		0.3	0.1	0.05		.02	
Acquisitions	6.87	10.05	1.83	1.23	0.5	0.57	.10	.15	
Cataloging	8.71	6.8	0.95	0.7	0.35	1.03	.01	.02	
Interlibrary Loan	2.20	1.5	1.32	0.7	0.55	0.41			
Special Collect.	1.26	0.1	0.16	0.29		0.12			
Data Base Maint.	4.71	3.4	0.43	0.25	0.25	0.44	.02	.20	
Audio/Visual	0.9	6.25	1.5	0.1	0.5	0.15		.40	
Public Service	15.58	5.45	1.92	2.81	0.7	1.58	.20		
Library Automation	0.76	2.2		0.1	0.15	0.2	.02	.10	
Planning/Evaluation	2.63	1.75		0.27	0.1	0.33	.10	.05	
Teaching	0.65	1.15		0.18	0.35	0.24	.05	.06	
Other		3.1	3.77			1.2			
Total	58.27	50.5	14.58	8.0	4.0	6.72	1.0	1.0	

SOURCE: Library Survey, Summer 1986

Public service, cataloging, acquisitions and general administration consume the greatest amount of staff effort.

A comparison of the distribution of staff effort among the libraries in the Montana University System is shown in Table 7.

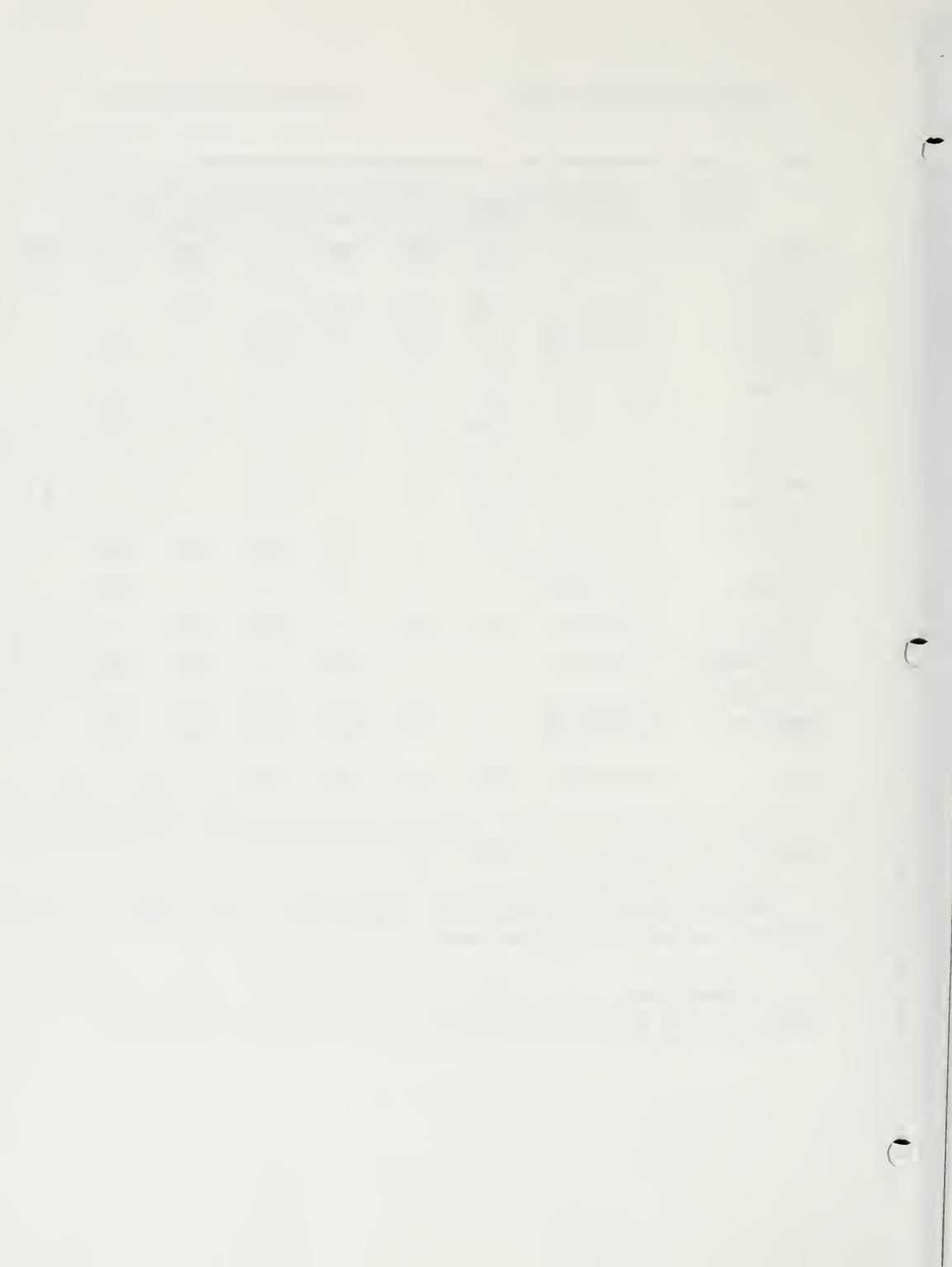


Table 7. Percent Distribution of Staff Effort Among Library Functions in the University System for FY 1986

<u>Function</u>	<u>MSU</u>	<u>UM</u>	<u>EMC</u>	<u>TECH</u>	<u>WMC</u>	<u>NMC</u>
Gen. Admin.	15	15	12	6	9	1
Documents	5	1	6	8	3	5
Reserve	4	1		4	3	1
Acquisitions	12	20	13	15	13	9
Cataloging	15	13	7	9	9	16
ILL	4	3	9	9	14	7
Spec. Coll.	2	*	1	4		2
Data Base Maint.	8	7	3	3	6	7
Audio/Visual	2	12	10	1	13	2
Public Service	21	11	13	35	18	23
Lib. Automation	1	4		1	4	3
Plan/Eval.	5	3		3	3	5
Teaching	1	2		2	9	3
Other		6	26			18

*Less than 1%

It is interesting that public service effort is not the function which consumes the largest percent of total effort at the University of Montana and Eastern Montana College.

Academic status of librarians

The status of professional academic librarians has for some time been an issue across the United States.¹⁵ Northern Montana College librarians do not have faculty status. The majority of the librarians in the Montana University System are in tenure track positions and about 3/4 hold tenure. Table 8 portrays these data.

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Table 8. Faculty Status of Librarians

<u>Institution</u>	<u># Prof. Librarians</u>	<u>On Tenure Track</u>	<u>Tenure</u>	<u>Faculty Rank</u>
TECH	2	1		2
NMC*	3			
UM	15	14	13	14
Law	2		2	2
MSU	22	22	11	22
EMC	7		3	6
WMC	2			2
DCC				
MCC				
FVCC				

* Two librarians are classified employees.

Two of the library directors hold the position of dean, 2 are tenured, 2 are on tenure track positions and 5 hold faculty rank.

Library expenditures

A library constitutes one of the larger cost centers at any campus. Table 9 shows expenditures by major categories for FY 1986.

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Table 9. Library Expenditures, by Campus, FY 1986

<u>Inst.</u>	<u>Personal Services*</u>	<u>Operating Expenses</u>	<u>E Books</u>	<u>Q Serials</u>	<u>U</u>	<u>I</u>	<u>P</u>	<u>M</u>	<u>E Aud/Vis.</u>	<u>N</u>	<u>T</u>	<u>Other Exp.</u>	<u>Total Expend.</u>
MSU UM	\$1,279,802	\$207,204	\$231,018	\$552,864	\$ 2,938				\$39,169	\$2,312,995			
Main	961,260	193,143	127,177	420,667	30,600				83,389	1,816,236			
Law	127,703	12,456	11,464	130,722					516	282,861			
IMS	180,418	11,222							1,512	193,152			
	\$1,269,381	216,821	138,641	551,389	30,600				75,417	2,292,249			
EMC	483,095	90,641	75,494	92,024					10,485	751,739			
TECH	179,111	34,177	38,257	71,050					1,736	324,332			
NMC	147,632	47,990	48,038	28,106					15,092	310,262			
WMC	49,915	28,376	17,458	22,606					5,585	133,794			
FVCC	35,184	45,141	6,625	2,900						89,850			
DCC	34,858	4,687	7,332	7,030					2,431	56,338			
MCC	60,369	7,840	14,869	6,941					5,440	95,459			

* Fringe benefits included.

Total expenditures for public academic libraries for this single year were approximately \$6.3 million.

Distribution of library expenditures by category varies among the campuses, reflecting choices made by the library, faculty and administration.

The pattern of expenditures in academic libraries (perhaps larger ones) is typically 60 percent to salaries, 30 percent for materials and 10 percent for other purposes. Recent trends have shown shifts between the allocation of acquisitions expenditures for books and serials from 62% and 34% in 1970 to 44% and 50% in the late 1970s.¹³

Table 10 shows these expenditure categories as percentages of total campus library expenditures.

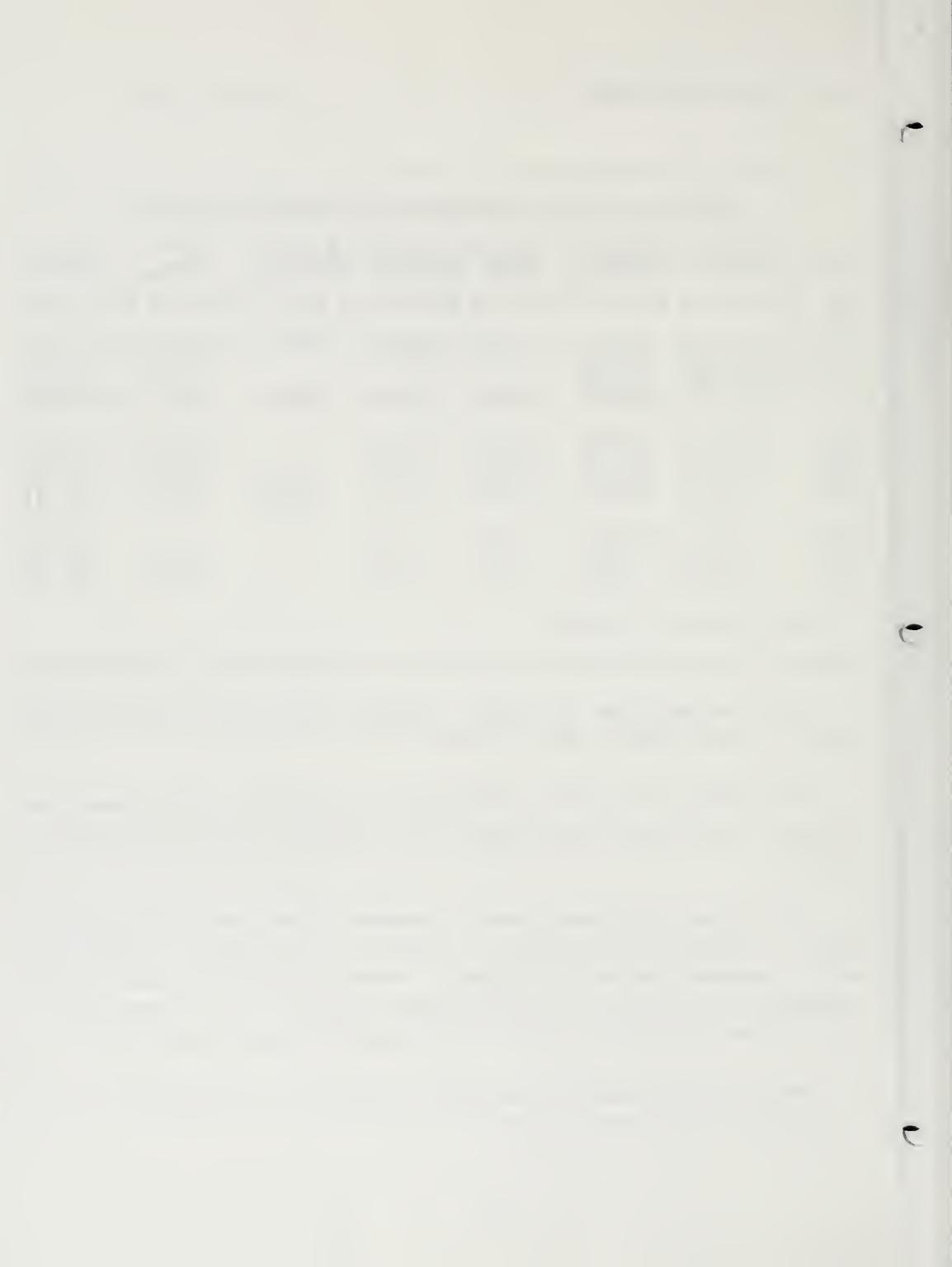


Table 10. Specific Library Expenditures as Percent
of Total Library Expenditures, Fiscal Year 1986

<u>Inst.</u>	<u>Personal Services</u>	<u>Operating Expenses</u>	<u>E Books</u>	<u>Q Serials</u>	<u>U</u>	<u>I</u>	<u>P</u>	<u>M</u>	<u>E Aud/Vis.</u>	<u>N</u>	<u>T</u>	<u>Other Exp.</u>	Total Expend.
MSU	55.33	8.96	9.99	23.90				0.12			1.69		100.00
UM													
*Main	56.82	10.17	6.33	20.94				1.52			4.23		100.00
Law	45.15	4.40	4.05	46.21							0.18		100.00
EMC	64.26	12.06	10.04	12.24							1.39		100.00
TECH	55.22	10.54	11.80	21.91							0.54		100.00
NMC	47.58	15.47	15.48	9.06				7.54			4.86		100.00
WMC	37.30	21.21	13.05	16.90				7.37			4.17		100.00
FVCC	39.16	50.24	7.37	3.22									100.00
DCC	61.87	8.32	13.01	12.48							4.32		100.00
MCC	63.24	8.21	15.58	7.27							5.70		100.00

* Includes IMS

These data show that in Montana between 23 and 50% of the library budgets are used for books and materials, below the national figures cited earlier.

Per Student Expenditures

Expenditure per student is one yardstick used to compare fiscal support. It can be considered within categories of institutions and among the states.

The data from Montana institutions in Table 11 show differences in library expenditures per student.

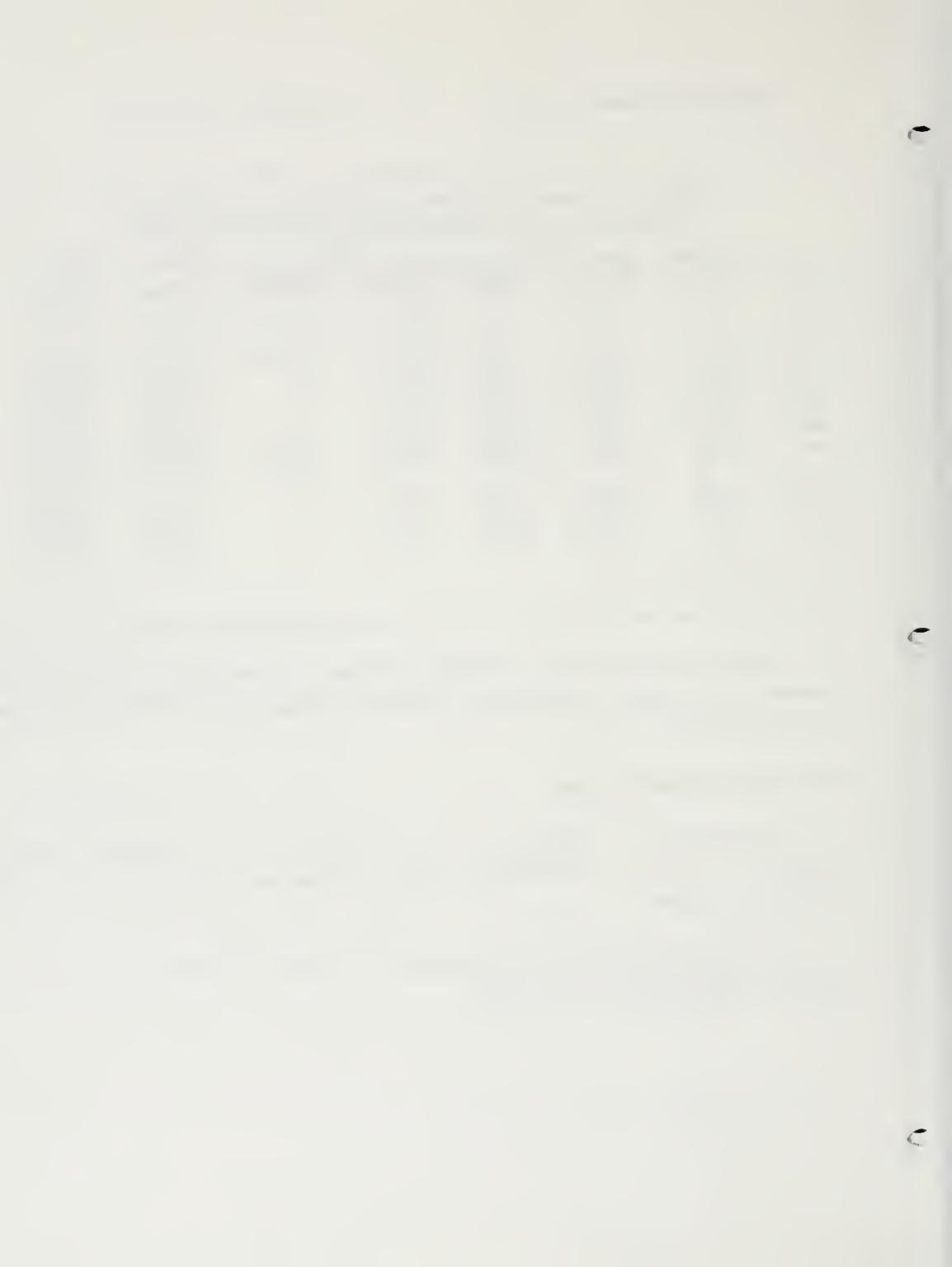


Table 11. Library Expenditures Per Student,
by Institution, in Montana, FY 1985 and FY 1986

<u>Institution</u>	<u>Total Expenditures Per Student</u>		<u>Materials Expenditures¹ Per Student</u>	
	<u>FY 1985</u>	<u>FY 1986</u>	<u>FY 1985</u>	<u>FY 1986</u>
MSU	\$216.78	\$228.92	\$80.51	\$77.58
UM ²	\$216.48	\$245.4 ⁷⁴	\$78.01	66.92
UM ³	(249.09)	(280.02) ⁴	(93.57)	(84.29)
EMC	207.11	218.40	41.84	48.67
TECH	211.42	195.50	76.82	65.89
NMC	194.09	183.26	61.72	44.98
WMC	168.47	156.67	51.76	46.91
FVCC	98.92	94.88	12.55	10.06
DCC	152.35	117.23	37.38	29.86
MCC	230.58	218.94	63.34	50.02

¹Books and serials only.

²Excluding Law School Library.

³Including Law School Library.

⁴Including Instructional Materials Services

Per student library expenditures increased at 3 institutions and decreased at 6 institutions between the two years.

The most recent national data available shows library expenditures per student among the states for FY 1982-83. In public institutions, the US average was \$190.43 while the highest figure was \$653.37 for Alaska and the lowest was \$145.71 for Connecticut. Montana's figure for that year was \$200.69.¹⁷ These figures exclude expenditures for utilities, plant maintenance and operation, and capital outlay.

Relationship to institutional budgets

Academic libraries have traditionally represented 3 - 4% of an institution's budget.¹⁸ The 1986 Standards for College Libraries suggest it should be 6% of the total institutional budget for educational and general expenditures.¹⁹

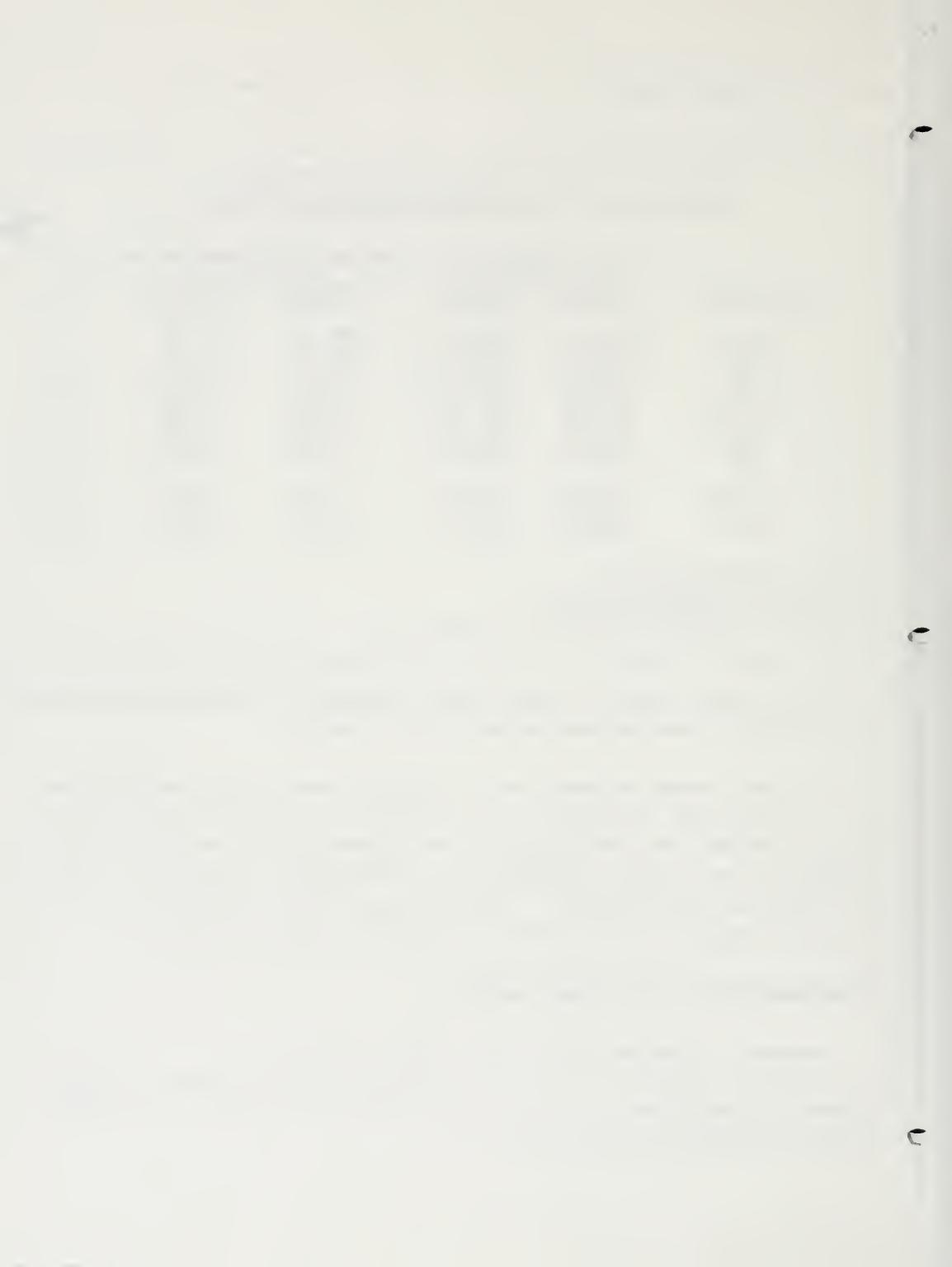


Table 12 shows library expenditures within the Montana University System and community colleges as a percentage of institutional budgets for several years.

Table 12. Library Expenditures as Percent of Institutional Expenditures, Fiscal Years 1984-1986*

<u>Institution</u>	<u>FY 1984</u>	<u>FY 1985</u>	<u>FY 1986</u>
MSU	5.0 (3.8)	4.9 (3.8)	5.1 (4.0)
UM			
Main	4.7 (4.6)	4.9 (4.8)	5.6 (5.5)**
Including Law	5.5 (5.4)	5.7 (5.6)	6.4 (6.3)**
EMC	5.1	5.1	5.5
TECH	3.6 (3.2)	4.4 (3.8)	3.7 (3.2)
NMC	4.4	4.3	4.1
WMC	4.1	3.7	3.4
FVCC	3.0	2.8	2.9
DCC	4.3	4.9	3.8
MCC	6.9	5.2	5.5

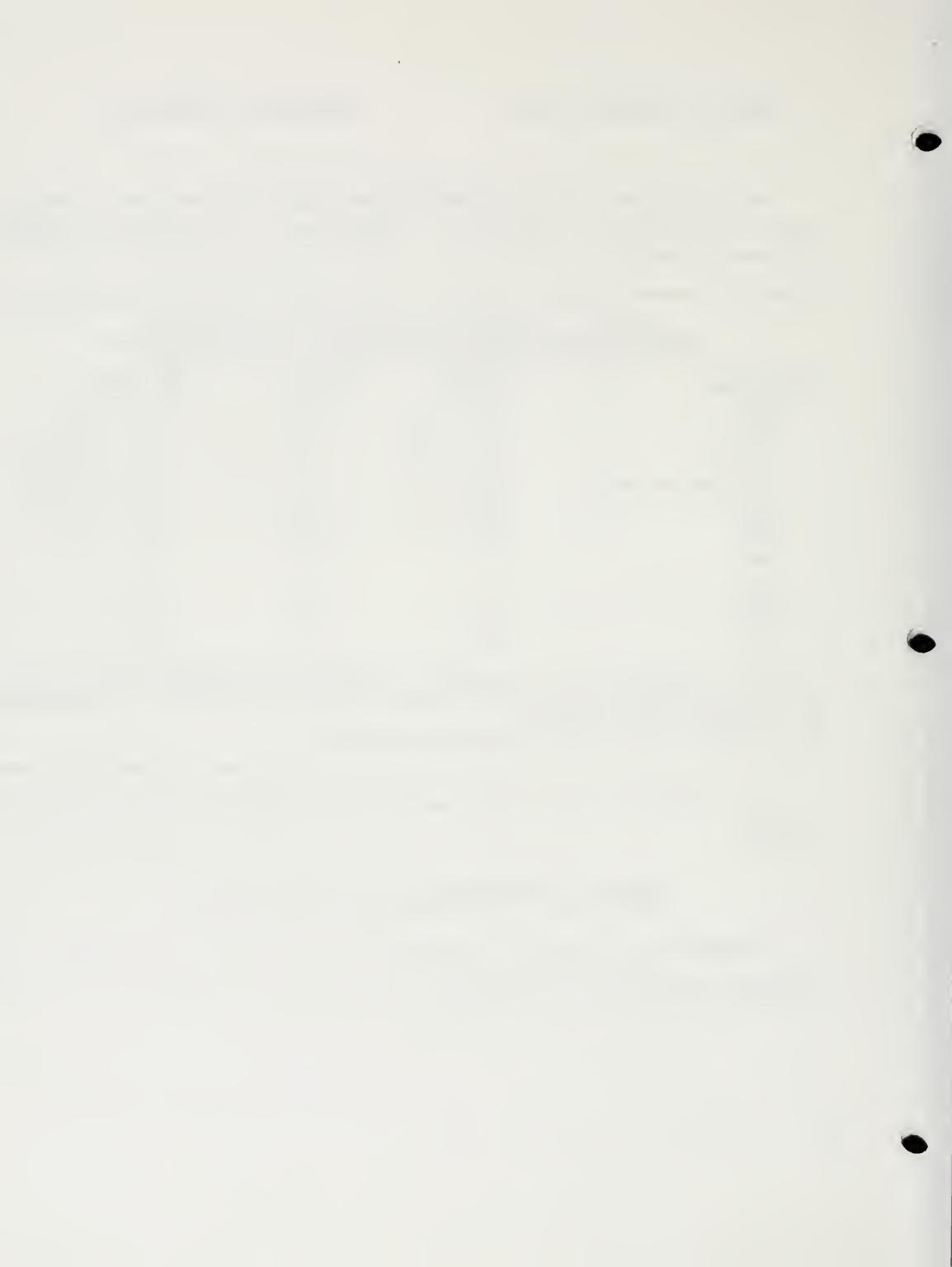
* Figure in parenthesis is percent if additional budgets such as Agricultural Experiment Station, Forestry Experiment Station or the Bureau of the Mines are included.

** Includes Instructional Materials Services

It is evident that Montana institutions generally fit the national pattern.

Planning, Evaluation and Library Automation

In addition to planning represented by collection development assessments and budget allocations, librarians are concerned with automation, space needs, service hours, library evaluations, etc.



Automation

Library automation planning and implementation is a lengthy process involving needs assessment, development of bid specifications, evaluation of vendor responses, selection of low bidder, preparation for installation and eventual operations.

A library automation project typically includes preparation of a data base, an on-line catalog to replace the card catalog, circulation control systems, acquisition and accounting modules, an extensive Boolean searching capability, etc.

Western Library Network

Several years ago all university libraries as well as the state library and public libraries, some school libraries and special libraries, began to place their holdings records in machine readable form. Utilizing the bibliographic utility known as the Western Library Network (formerly Washington Library Network), the libraries began to enhance their capability for resource sharing and prepare for future library automation. The process of preparing existing holdings for computerized applications which is time consuming, labor intensive and costly, has been pursued with greater or lesser vigor by institutions in Montana. Table 13 shows estimates of the percentage of the collections which are now in machine readable form.



Table 13. Estimated Percentage of Holdings in Montana Academic Libraries which are in Machine Readable Form as of June 30, 1986

<u>Institution</u>	<u>Percent</u>
MSU	79
UM	
Main	53
Law	0
EMC	61
TECH	80
NMC	88
WMC	20
FVCC	97
DCC	0
MCC	0

SOURCE: Library Survey, Summer 1986

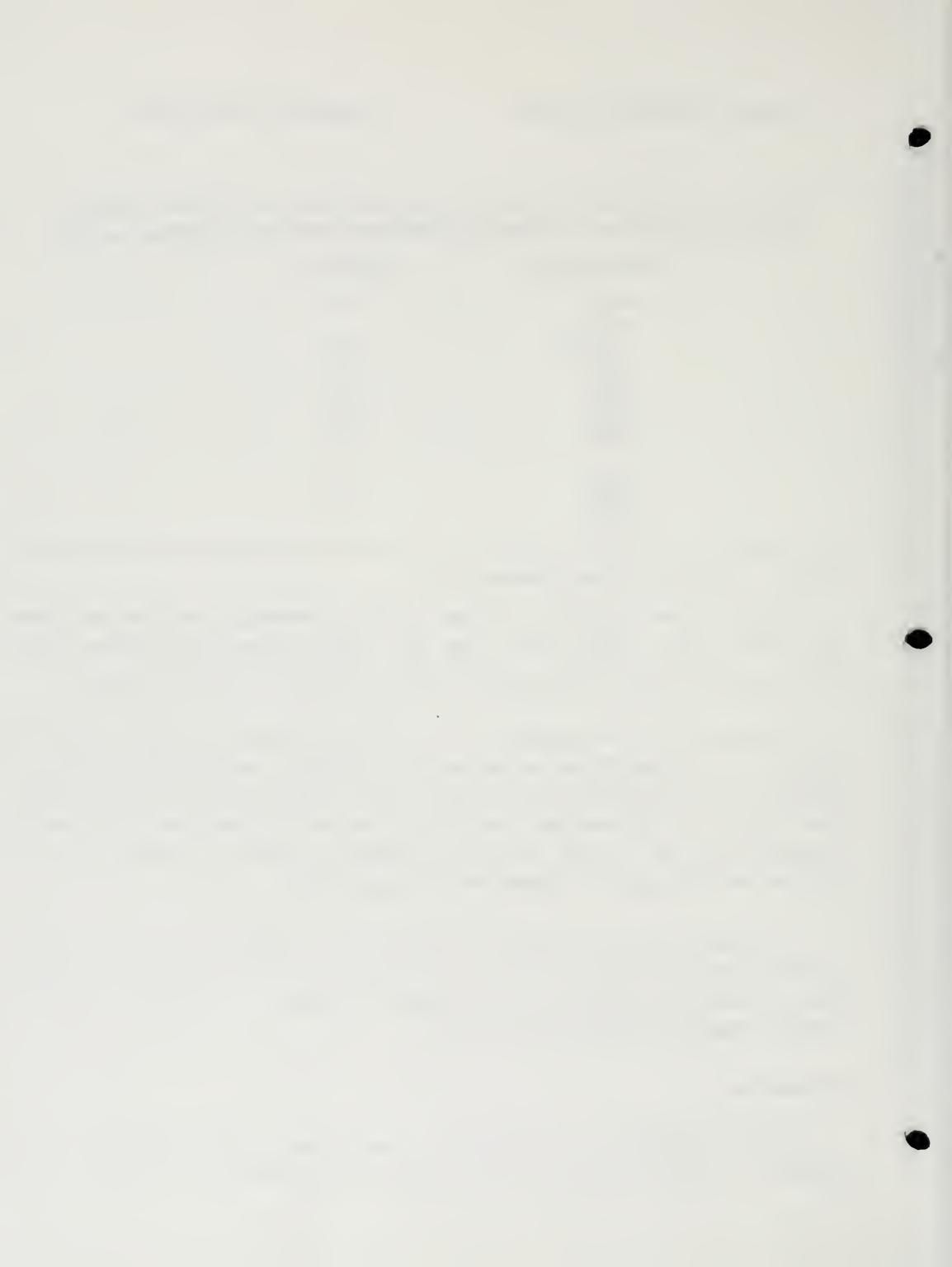
Some of the progress towards machine readable records was made utilizing local funds and some has been supported through LSCA (Library Services and Construction Act), coal tax funds or grants.

Montana State University is the first university system unit to arrive at the installation phase of a library automation project in Montana. The University of Montana will likely reach the same position within 12-18 months. Northern Montana College has a planning timetable for an on-line catalog; however, it and the other units are not yet able to pursue automation as vigorously.

In addition to this type of automation, libraries are vigorously pursuing the potential of new technologies such as the CD-ROM (Compact Disk - Read Only Memory) laser disks in efforts to reduce costs and improve resource sharing activities.

Evaluation

While evaluation is obviously a management responsibility to be shared by the librarian and college administration, there is no



insti-tutional library evaluation evident except to the extent that an evaluation is performed as part of an accreditation visit. 17

Library ratings.

The Association of College and Research Libraries has developed a rating scale for measuring several areas of a library's adequacy. Table 14 shows a summary of the current ratings for each of the university units, using these scales.

Table 14. Percentage of ALA Standards for Collections and Professional Staff Achieved and Ratings
Montana University System Libraries, 1986*

<u>Institution</u>	<u>Collection Percent</u>	<u>Collection Rating</u>	<u>Professional Staff Percent</u>	<u>Professional Staff Rating</u>
UM	80%	(B)	61%	(C)
MSU	69%	(C)	59%	(D)
TECH	100%	(A)	18%	(f)
WMC	72%	(C)	71%	(C)
NMC	53%	(D)	50%	(D)
EMC	56%	(D)	64%	(C)

*Facilities ratings are not shown here.

Source: Library Survey, Summer 1986

Resource Sharing

Sharing of library resources is becoming increasingly more important. The costs of serials and monographs continue to be a large part of library budgets while the information explosion and increasing numbers of article and book publications makes it impossible for libraries to acquire new materials in the same proportions as in the past. Increasing needs and a stable or declining expenditure base cause serious interruptions to the availability of information.

Coordinated collection development activities and interlibrary loan activities together assist in ameliorating the magnitude of the



problem but probably only to a small extent. Collection development policies attempt to direct acquisitions in concert with an institution's educational objectives and programs. Within a university system with differentiated role and scope assignments, coordinated collection development is possible.

In Montana coordinated collection development among the university libraries and the state library is voluntarily undertaken. Coordinated collection development within states and among states is a current emphasis of the Library and Information Resources of the Northwest project sponsored by the Fred Meyer Trust.

Coordinated collection development relies heavily upon interlibrary loan efforts of member libraries for its ultimate success. Interlibrary loan operations today rely heavily upon computerized bibliographic data bases for effectiveness in location. The combination of these two activities results in increasing costs at a time when expenditure bases are shriveling.

Interlibrary Loan Activity

Library resource sharing has long been an underpinning of library cooperation. Interlibrary loans constitute the most visible overt activity in resource sharing among all types of libraries -- academic, public, school and special purpose entities.

Traditionally, libraries have been committed to the concept of "free" services; that is, the patron did not have to pay additional fees to utilize the services. The concept may be closely related to the concept that information is universal and should not be limited.

Arguments for and against library user fees abound.²¹ The following are some of them:



Pro-fee arguments

1. Charging fees increases recognition of the value and importance of library services
2. Fees encourage efficient use of public resources
3. Fees promote service levels based on need and demand
4. Fees encourage management improvements
5. Fees limit waste and overconsumption
6. Fees enhance investment in ongoing maintenance and repair of public facilities
7. Fees encourage a better understanding of the financial limitations of the local government
8. Premium service should be provided only to those willing to pay a premium
9. The tradition of charging for services is part of American culture
10. Fees control growth of and lower demand for service
11. Escalating service costs make user fees a necessity
12. Most library users can afford to pay a fee
13. Without fees, public and academic libraries could not serve the large community or nonresidents
14. Fees cover only a small portion of the total cost of service provision
15. Fees for most services are simple and inexpensive to collect
16. Local policy may require libraries to charge for services

Anti-fee arguments

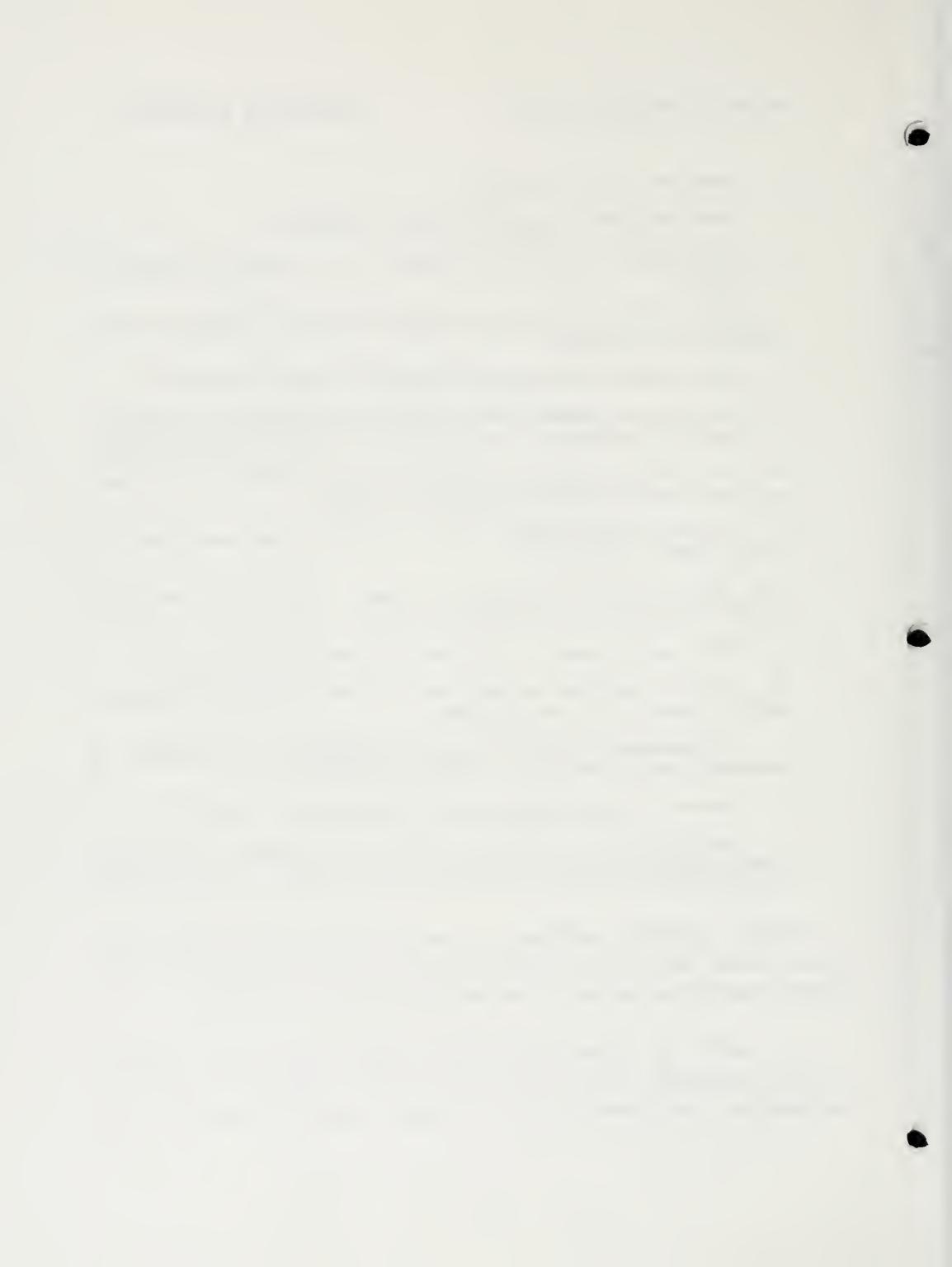
1. Library services are a public good
2. The American tradition of free library services is damaged by charging fees
3. Fees are illegal



4. Fees are discriminatory
5. Fees represent a form of double taxation
6. Libraries will place emphasis on revenue generating services
7. Fees will have the long-term effect of reducing public support for libraries
8. Fees might not be used to support library services
9. The social benefits for library services are difficult to measure, therefore a fee cannot be efficiently assigned
10. It is difficult to define special services and basic services and to distinguish between them
11. Private and public sector markets are separate and should remain separate
12. The cost of administering and collecting fees outweighs the financial benefits of fees
13. Most users have little need for fee-based services
14. If the service cannot be provided without a fee, the service should not be provided.
15. Improvements within library management and delivery of services would diminish the need for fees
16. There is considerable staff resistance to fees
17. Charging for a service subjects libraries to liability risks because of the responsibilities implicit in providing a service for a fee.

These arguments perhaps do not recognize the significant value which users attach to time-sensitive information nor perceived tiered structure of university library clientele.

As costs of library operations rise, particularly acquisitions, personnel and automation, greater pressure is felt to reconsider the "free" library concept. After operational re-



strictions to improve efficiency have been made, budget reductions, unaccompanied by reductions in service expectations and clientele, also create forces to install user charges.

The accuracy of existing information about the magnitude of interlibrary loan activity in Montana is debatable. It is widely believed, however, that the academic libraries of the Montana University System are the primary lending resources in the state. Table 15 portrays lending activity by those institutions for 1984-85 and 1985-86.

Table 15. Library Lending by the units of the
Montana University System
1984-85 and 1985-86*

Type	1984-85	1985-86
Articles	8,622	8,448
Books	6,270	7,752
Total	14,892	16,200

* Excludes non-print materials

Between 1984-85 and 1985-86 lending increased 8.8%.

The portions of the lending activity within the Montana University System attributable to the campuses is shown in Table 16.

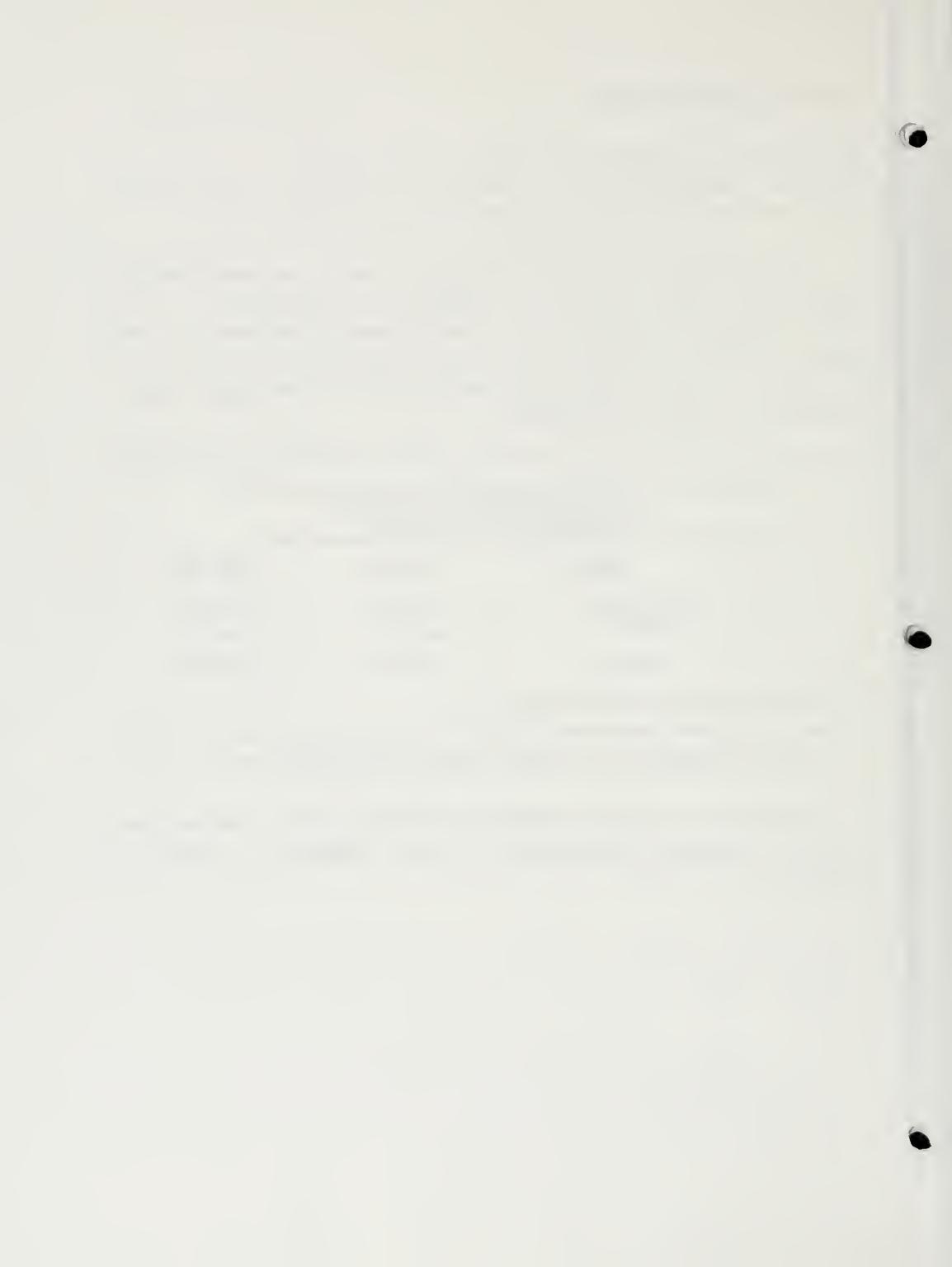


Table 16. Distribution of Lending Activity within the
 Montana University System, by campus,
 1984-85 and 1985-86

<u>Campus</u>	1984-85			1985-86		
	<u>Articles</u>	<u>Books</u>	<u>Total</u>	<u>Articles</u>	<u>Books</u>	<u>Total</u>
MSU	4,292	2,284	6,576	2,954	2,495	5,449
UM	2,746	1,907	4,653	3,415	2,408	5,823
EMC	754	365	1,119	1,086	501	1,587
TECH	264	409	673	324	522	846
NMC	566	1,305	1,871	669	1,826	2,495
WMC	—	—	—	—	—	—
Total	8,622	6,270	14,892	8,448	7,752	16,200

It is clear from Table 16 that the University of Montana and Montana State University account for nearly 3/4 of the total lending activity.

Lending library materials costs money in staff time, communications and transportation, photocopying, etc. A study at the University of Montana in 1982-83 computed the per transaction lending costs to be \$5.30 for completed transactions and \$3.53 for total lending transactions.

For the purposes of estimating costs the above figures have been increased by 10% for 1984-85 and an additional 5% for 1985-86 to \$5.83 and \$6.10 respectively.

Table 17 portrays estimated values for loan activities.

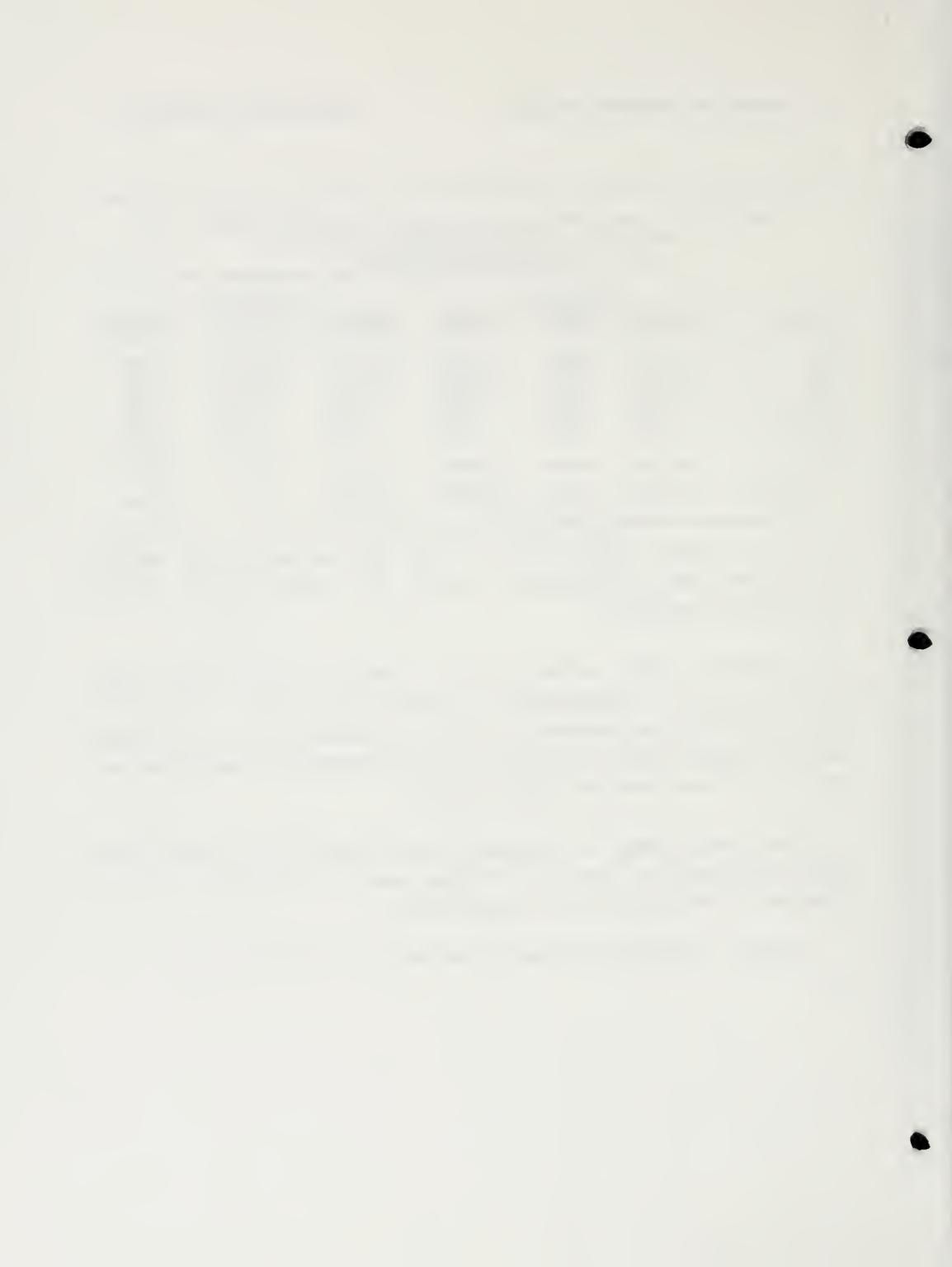


Table 17. Estimated Value of Lending Activity
 Montana University System
 1984-85 and 1985-86

<u>Year</u>	<u>Total Cost</u>	<u>Cost Attributable to Non-University Libraries</u>
1984-85	\$ 86,820	\$ 69,456
1985-86	102,060	81,648

The total cost of lending library materials is thus not an insignificant item, especially when budgets are being constricted.

There is no charge by the libraries of the Montana University System for lending activities among themselves. Some of the libraries have entered into contracts under which they are paid for lending services. Table 18 portrays lending activities after removing these two categories.

Table 18. Library Lending Activity within the
 Montana University System, 1984-85 and 1985-86,
After Removing University and Contractual Commitments

<u>Type</u>	<u>1984-85</u>	<u>1985-86</u>
Articles	3,698	3,051
Books	4,676	5,612
Total	8,374	8,663

Approximately 55% of the lending activity can be attributed to users not directly or contractually related to the units. Table 19 shows the estimated cost of providing lending services to these users.

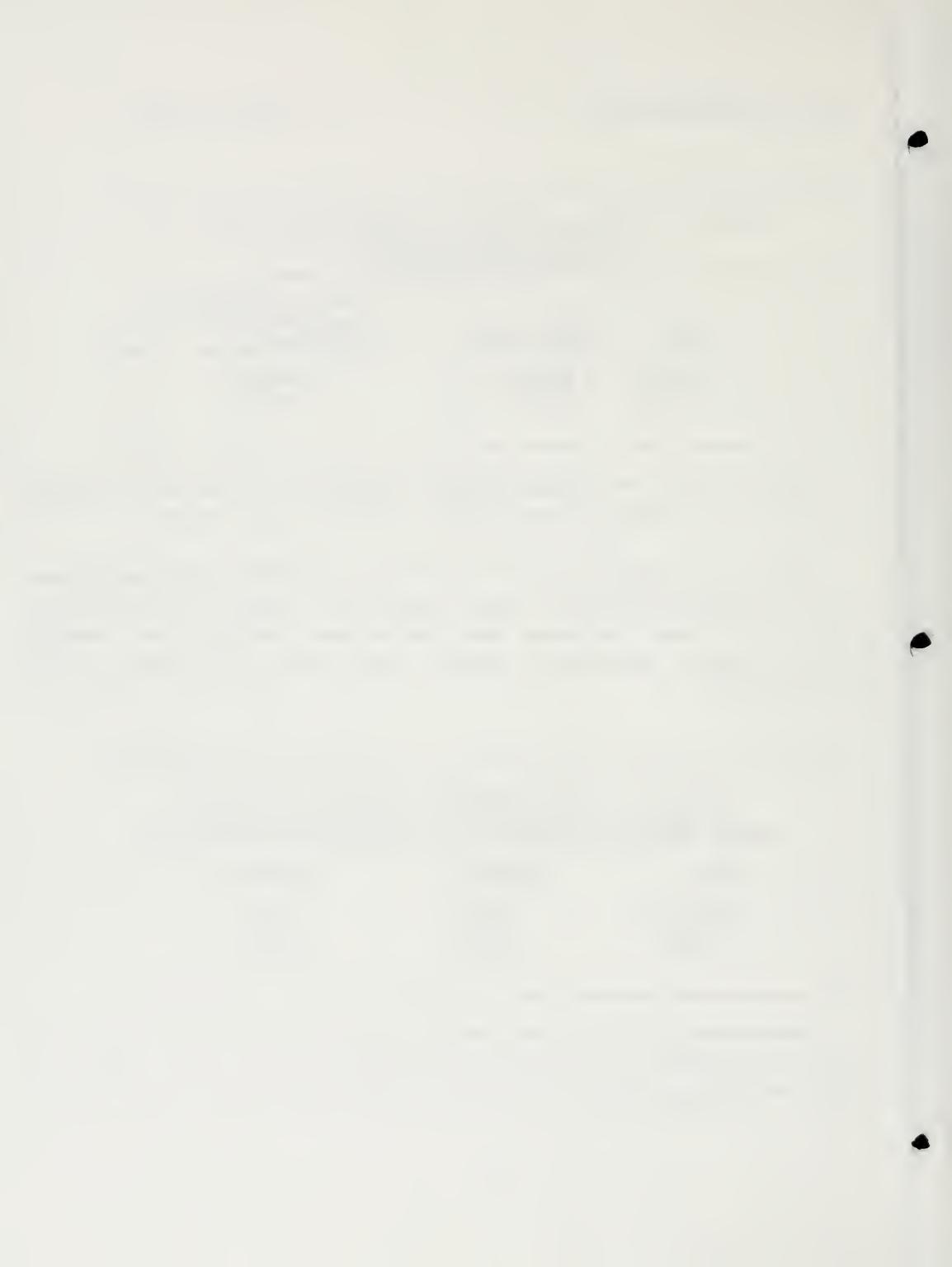


Table 19. Estimated lending costs within the Montana University System, after removing university and contractual commitments, 1984-85 and 1985-86

<u>Year</u>	<u>Estimated Cost</u>
1984-85	\$47,750
1985-86	56,130

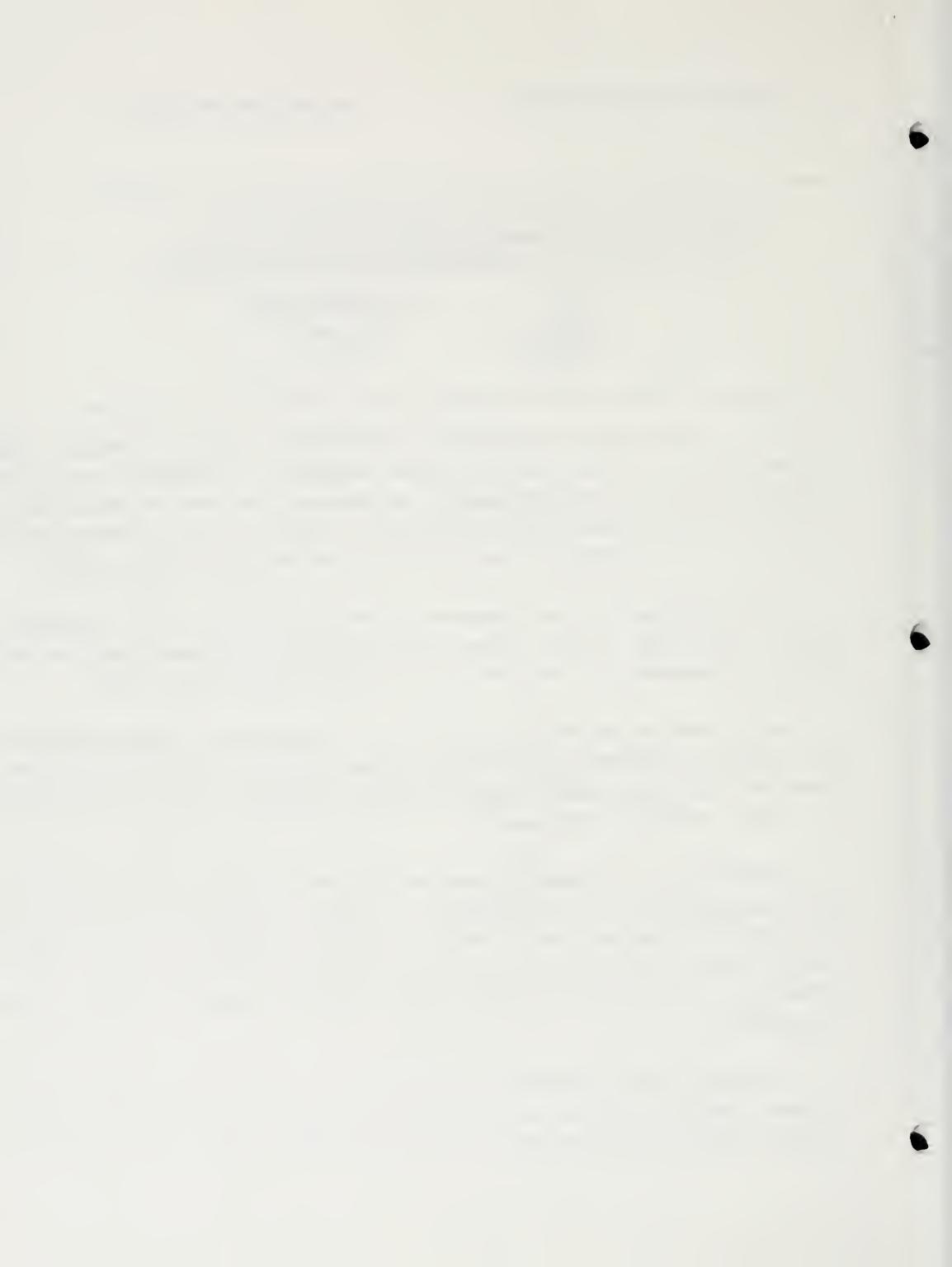
As an incentive to maintain interlibrary resource sharing, the Montana State Library makes a token payment of slightly more than \$3,000 per year to the University of Montana and Montana State University libraries and pays photocopying costs with the understanding there will be no charges to public libraries for interlibrary loans.

The libraries of the Montana University System borrow approximately 800 items a year from non-university and under contractual service arrangements. This is 1/10 the amount which they lend.

Participation by Montana libraries in the Western Library Network has fostered increased interlibrary loan activity as all libraries' resources are more easily identified and located. It is anticipated that this trend will continue.

Montana State University has established a patron fee of \$3 for each interlibrary loan transaction. Other university libraries are contemplating similar fees. Thus, a student, faculty or staff member (the primary clientele) is (or may be) required to participate individually in the cost of service while external users are exempt from the charge.

To insure that libraries are able to continue to provide interlibrary resource sharing services to the public, a permissible interlibrary loan transaction fee is being discussed. The state librarian



and most public librarians perceive such a fee to be a substantial deterrent to library resource sharing and inimical to the state's needs.

Miscellaneous considerations

Montana University System Library Card

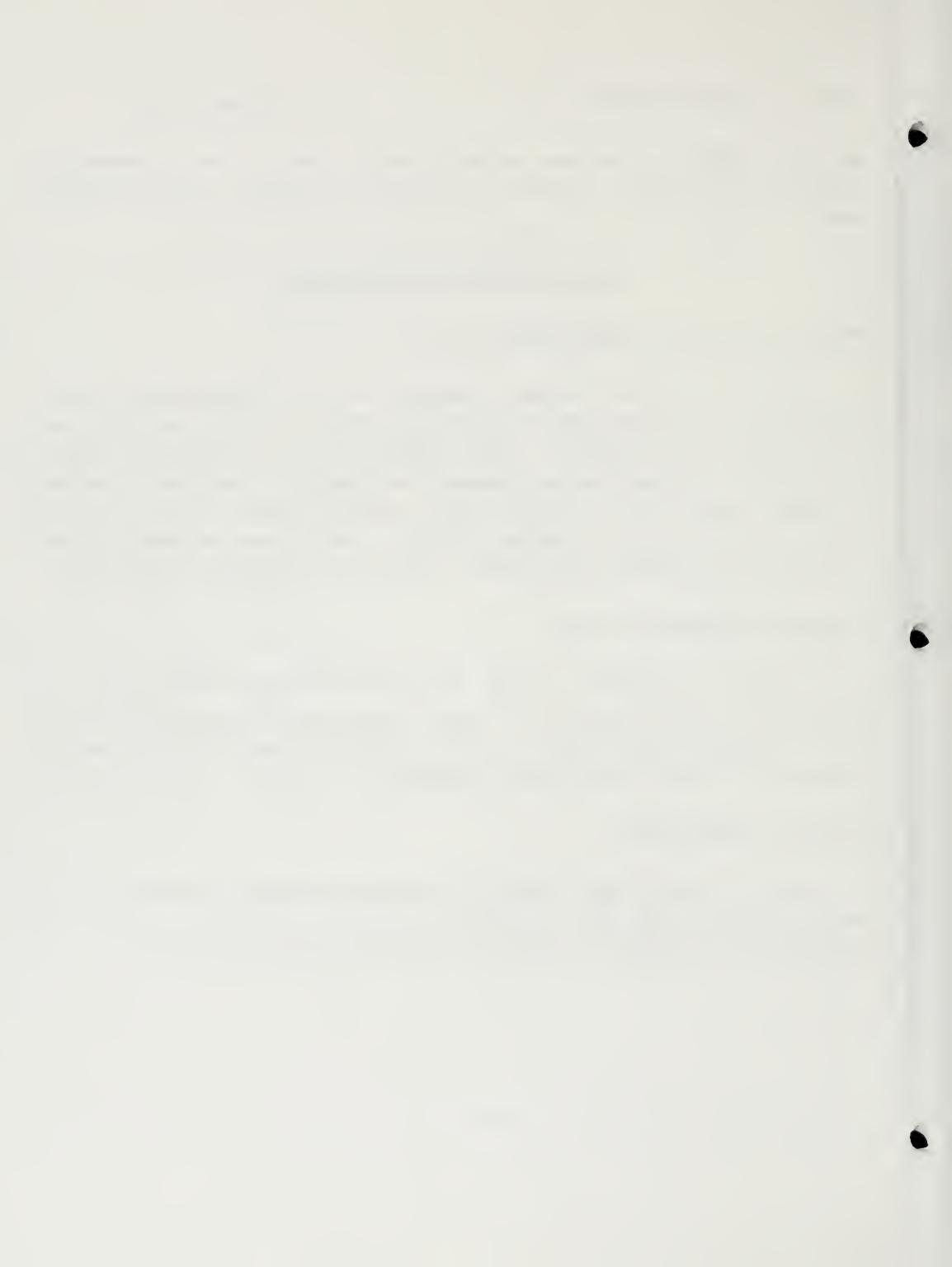
Montana University System librarians are not overwhelmingly enthusiastic for a single Montana University System library card for faculty, staff and students. There apparently was an earlier understanding by a Consortium of Academic and Special Libraries in Montana to accept each other's library cards, undertake loans and allow materials to be returned for another library. No written agreement is extant and the agreement has evidently fallen into disuse or little use.

Business Information Center

A single information center to which businesses could turn for assistance is not perceived by these librarians as particularly useful. They apparently fear it would adversely impact current special projects or library operations in general.

High cost acquisitions

There is some ad hoc cooperation among particular libraries in the acquisition of high cost indexes or other library items, but the librarians don't profess any need for greater system-wide efforts.



Summary

While the library holdings within the Montana University System are not large if compared with some other public state institutions, they nevertheless constitute the largest collections in the state and represent a very important resource for the people of Montana.

Additional information

Detailed additional information about library operations in the state is contained in appendixes.

